



# Work @ Home

## ***BEST PRACTICES NORTHRIDGE APPROACH***

*March 20, 2020*



**THE  
NORTHRIDGE  
GROUP**



*Work @ Home Overview*

*Traditional W@H*

*Urgent Needs: COVID-19*

*Closing Comments*

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# W@H Overview

BEST PRACTICES AND INSIGHTS



- Global impacts of COVID–19 have required organizations to quickly look at options to deploy staff to work from home
- In many situations, this option was not previously offered broadly to front-line employees
- Our goal is to summarize W@H best practices you can leverage longer-term and as you quickly ramp up this offering
- High level areas we will explore:
  - Technology and Security Options
  - Operational approach - Employees
  - Operational approach - Leadership

*We hope this provides some support to you and your teams during these unprecedented times*



# Technology Solutions & Security

POSITIONING YOUR ORGANIZATION FOR SUCCESSFUL OUTCOMES



*When transitioning premise-based contact center agents to W@H, key technical considerations need to be carefully planned to ensure high productivity in a secure environment*

Key Requirements	Description	Options	Additional Considerations
Internet Access for Data	<ul style="list-style-type: none"> <li>Reliable Internet service with sufficient bandwidth to send/receive data with minimal latency</li> <li>Secure connection via VPN tunnel ensures only agent workstation can connect to data network</li> </ul>	<ul style="list-style-type: none"> <li>If broadband access is available via internet service provider (ISP), a VPN client (token-based) can be installed on agents' workstations by IT</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that service provider provides data encryption via VPN</li> <li>Proper security levels to be configured on VPN (eg., PCI security)</li> </ul>
		<ul style="list-style-type: none"> <li>If no broadband access available or insufficient bandwidth, cellular carriers offer broadband access</li> </ul>	<ul style="list-style-type: none"> <li>If cellular, LTE modems with built-in security are available to connect to workstation</li> </ul>
Routing of Voice Calls	<ul style="list-style-type: none"> <li>Calls to be re-routed from original destination of the physical call center to agents' homes</li> </ul>	<ul style="list-style-type: none"> <li>Cloud provider (CCaaS) can be used to re-route calls to any IP address / number (i.e., agents' workstations)</li> </ul>	<ul style="list-style-type: none"> <li>Softphone software installed on agent workstations for call handling functions eliminates need for physical phones</li> </ul>
Agent Workstations and Tools	<ul style="list-style-type: none"> <li>Corporate-owned workstations</li> <li>Required applications needed to either be loaded directly onto workstations or accessible via VPN</li> </ul>	<ul style="list-style-type: none"> <li>Web / browser-based applications, if available, are easily accessed via internet browser</li> <li>If applications are not available as browser-based, IT will be required to install on agent workstations</li> </ul>	<ul style="list-style-type: none"> <li>Team-based messaging (e.g., chat) can assist collaboration</li> <li>Technologies available to monitor employee navigation during the course of the day</li> </ul>

***Protecting your organization and customer data is critical***

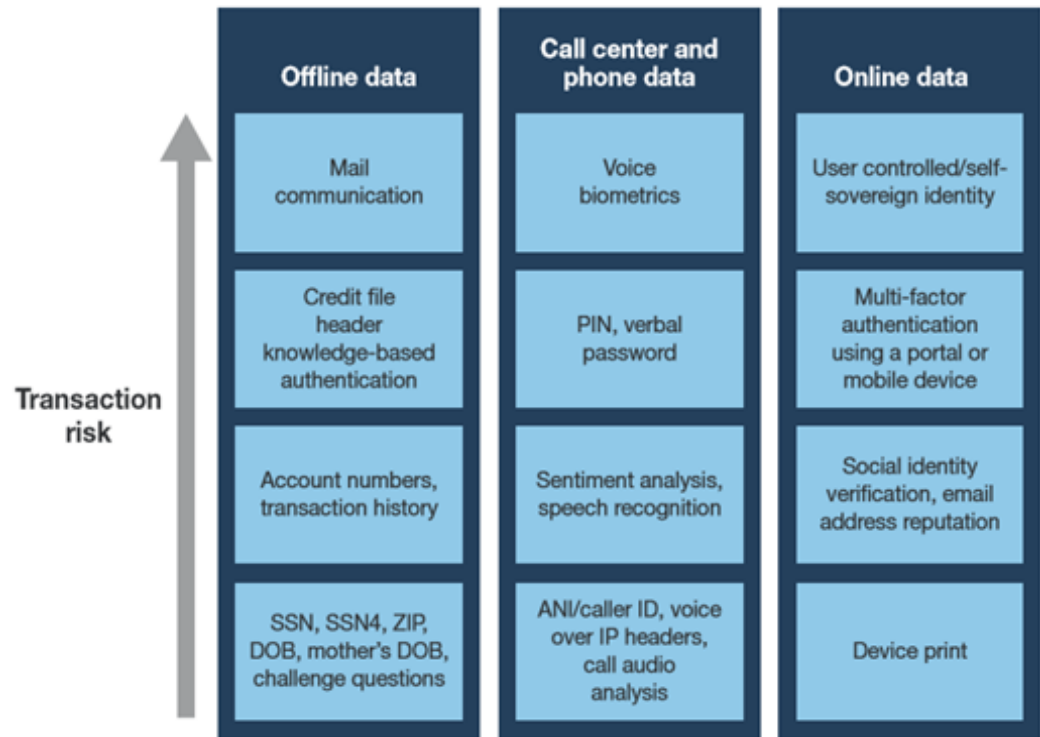
# Authentication Best Practices

PROVIDING COMPREHENSIVE SECURITY WITH LOW EFFORT



- Multi-factor authentication uses multiple forms of security (at least two) when logging into the VPN or corporate network
  - Something you know (e.g., a password)
  - Something you have (e.g., hardware token or mobile phone)
  - Something you are (e.g., fingerprint)
- Most commonly used:
  - Username / password
  - A unique code sent via text to user's smartphone
  - PIN, as a prefix to the token code
- Biometrics solutions are evolving and make authentication more effortless
  - Fingerprint scans / facial scans / voice recognition, to prove the user's identify

Figure 3 Multilayered CCCA Must Use Sources Of Offline Data, Call Center and Phone Data, and Online Data



Source: Forrester, Best Practices: Customer Call Center Authentication, March 22, 2019

# Other Technology Considerations

INCREASING CONTROL AND TEAM FLEXIBILITY



Additional technology options to improve agent productivity, collaboration and business/customer security:

- Auto-lock workstations if no activity after 10 minutes
- Restrict printing / USB capabilities (based on role)
- Install business-level virus and malware protection on all workstations
- Quality USB/Bluetooth headsets
- Collaboration tools and platforms for creating a sense of community among the agents and facilitate manager check-ins
  - Instant Messaging examples: Teams, Slack, Jabber, Hangouts, HipChat
  - Video collaboration examples: WebEx, Zoom, Skype, FaceTime, MS Teams
  - Document collaboration examples: Office 365, MS Teams, Google Docs, One Drive

***An experienced IT staff and technical support team is key to the transition plan***



# W@H Policy

LONG-TERM CONSIDERATIONS

# Developing your Requirements

## POLICY CONSIDERATIONS



*Consider these components as you define your W@H policy criteria and requirements*

- **W@H Type(s):**
  - Dedicated: Employee who works from home all the time and do **not** maintain a cube or office
  - Flexible: Employee who works from home a portion of the time **and** maintains a cube or office
- **Max W@H:** % of Staff the business allows to work at home
- **Position Eligibility:** Positions the business determines are eligible
- **Tenure:** Minimum employment tenure required
- **Performance Expectations:** Standard that an employee must maintain to be eligible
  - Achieving at or above expectations rating on recent review
  - Productivity at or above expectations
- **Poor Performance Repercussions:** Actions taken if employee performance standards are not met
  - Leaders will take actions to help the employee improve sub-standard performance
  - This may include requiring the employee to work in an office and/or to receive in-person training or coaching



# Developing your Requirements

## ADDITIONAL CONSIDERATIONS



*Consider short and long-term needs; ensure requirements provide controls and flexibility*

- **Location:** Consideration for # of miles an employee must live and work within a company location
- **Workspace:**
  - Safety, ergonomics, security and set expectations that workspace disruptions and background noise cannot interfere with customer experience
  - All young children and children that could cause a disruption are either in an off-site day care, school or have an onsite caregiver
- **Equipment:**
  - Hardware, software, camera access to view workspace, telephony connection, headset, data connectivity
  - AI-powered virtual assistants (ie: Alexa, Google Home, Apple HomePod) technology should be turned off or stored outside of dedicated space to protect data (PCI, PHI and PII)
- **Employee Data Security:**
  - Define employee expectations to protect proprietary company and customer information accessible from their home office
  - Options include: use of locked file cabinets and desks, regular password maintenance and any other measures appropriate for the job and the environment

# Developing your Requirements

## FINAL CONSIDERATIONS



- **In-office Expectations:** Define if in-office work is expected, if travel to the office is compensated and the amount of notice employees will be provided when they are required to work in the office
  - **Expectation examples:** Employees may be required to be in the office for meetings, team activities, training, coaching/performance discussions, corrective action, compromised home internet access, system issues and other reasons as defined by management
  - **Travel compensation example:** Travel will not be compensated for W@H employees working in the office
  - **In-Office work notification example:** Management will provide as much advanced notice of required time in the office as possible
- **Policy Changes:** Include in documentation to reserves the right to change W@H requirements at any time
- **Documentation:** Maintain documentation of employees consent to follow all company and W@H policies
- **Quality Monitoring:** Consider % of calls and screen capture you will record for all employees

# Supporting your Employees

COLLABORATE AND ENGAGE YOUR TEAM



## *Provide support and create remote escalation options*

### Communication Approaches to Consider

- Proactively communicate support protocol upfront to minimize employee concerns
  - Provide dedicated assist phone line for instant access to support
  - Leverage an instant messaging tool to communicate with manager, assist line and colleagues
- Intentionally create and leverage virtual spaces to foster a sense of community
  - Examples: Recognition, company updates, policy/process changes, daily huddles, etc.
- Provide W@H employees access to Leadership, HR and IT services
- Maintain accessible emergency contact lists for managers and agents

# Performance Management

RESULTS FOR W@H SHOULD MIRROR IN OFFICE STAFF



## Measuring

- Same metrics for in-office and W@H staff
- New measurement to be created on Supervisor accessibility
  - Example: monthly survey from staff

## Performance Expectations (Supervisor to employee)

- Define performance and productivity expectations
- Outline how employees will receive their performance metrics
- Schedule check-in and attendance reporting process
- Communicate response time expectations and tools to use
- Establish metric coaching cadence

## Monitoring (Supervisor to employee)

- Monitor performance results and listen to calls
- Identify trends
- Reward key improvements
- Coach to on-going opportunities



*Setting expectations initially with your employees is a critical component to W@H*

# Remote Coaching Process

REINFORCE COACHING CADENCE



**Remote coaching is potentially a new experience for many Supervisors; steps are similar to in-office but require more focus on communication and engagement**

**Coaching Session** discuss overall trends, progress, performance results & next steps

**Plan** for the upcoming discussion by reviewing quality & customer feedback and performance metrics

**Motivate** overall team and drive culture through team meetings/huddles & rewards and recognition

**Weekly** touch base to see how all is going; any support needed or questions?  
Listen to calls (remote)

## Coaching Cycle

**Reinforce** behaviors you observe (through monitoring, quality, customer feedback & productivity metrics)

**Stay Connected** check-in with daily “virtual fly by”

### Virtual Requires More Focus:

- Active listening
- Foster two-way dialog
- Call to just check in
- Attentive to IMs
- Celebrate successes
- Avoid interruptions
- Do not multi-task
- Balance 1:1 and team time

# Managing your Employees

SUPPORTING AND MANAGING YOUR EMPLOYEES REMOTELY



*Verify customer needs are being met, engage employees and maximize staffing*

## **Remote Employee Coaching**

- Define quality monitoring expectations
  - Example: Minimum of 2 calls scored and covered weekly with each agent; 100% of all calls and screen capture recorded
- Establish metric coaching cadence
  - Example: Agents have accessibility to their current performance; formal manager review weekly

## **Engagement**

- Create strong virtual connection: Adopt a daily communication cadence with employees through group forums and individual outreach
- Hold and record virtual team meetings
- Consider video conferencing or in office sessions for one on ones

## **Maximize Staffing**

- Track and address attendance / schedule compliance issues
- Develop engaging virtual real-time approach to post extra hours and voluntary time off



# W@H Policy

IMMEDIATE NEEDS DUE TO COVID-19

# Quick Start – Work from Home



EMERGENCY PROTOCOLS

*If no established policy, best practices on how to quickly support W@H with COVID-19*

- **Develop W@H technology requirements:** Accessibility, bandwidth, security and telephony routing
  - ISP or cellular service (Mobile hotspot or LTE modem if broadband service is limited or unavailable)
  - Determine if home computers, company issued laptops or combination will be used
- **Outline requirements for W@H office space:**
  - Internet access and speed (ISP/Cellular)
  - Workstations and tools
  - Security protocols and policies
- **Determine the instant messaging and video tools that will be used to connect virtually**  
**Free/expanded offerings due to recent events:**
  - Consider free version of Microsoft Teams or Zoom for chat/IM, video/audio conferencing for internal meetings if a corporate tool isn't already available
  - Cisco's WebEx service has also been enhanced with unlimited usage and toll dial-in
- **Create escalation tools and ensure W@H employees understand how to use them:**
  - Dedicated assist phone line for instant access to help
  - Provide W@H remote access to Leadership, HR and IT services
  - Maintain accessible emergency contact lists for managers and agents



# Quick Start – Expectations



REINFORCE AND DEFINE INITIAL EXPECTATIONS

- **Develop “interim” W@H policy:** Include performance expectations, security and confidentiality requirements; have all employees sign and maintain records of consent
- **Workspace Requirements:**
  - Dedicated, un-interrupted workspace, privacy from family and friends
  - Safety, ergonomics and security
- **Agents:**
  - Performance and productivity standards
  - Schedule check-in and attendance reporting process
  - Communication response time expectations and the tools to use
  - Leverage virtual resources and escalation tools provided / ask if unsure on how to use
- **Supervisors and Managers:**
  - Define escalation and communication response time expectations; define tools to utilize
  - Ensuring staff has needed access to perform their function and expected productivity is maintained
  - Establish frequency of team/individual staff communication, quality monitoring, productivity monitoring and performance conversations

***Future Planning: Determine long-term company-wide W@H policy***

# Final Comments



Please feel free to reach out if we can be of any assistance  
***We will all get through this together!***

